

FIG.1

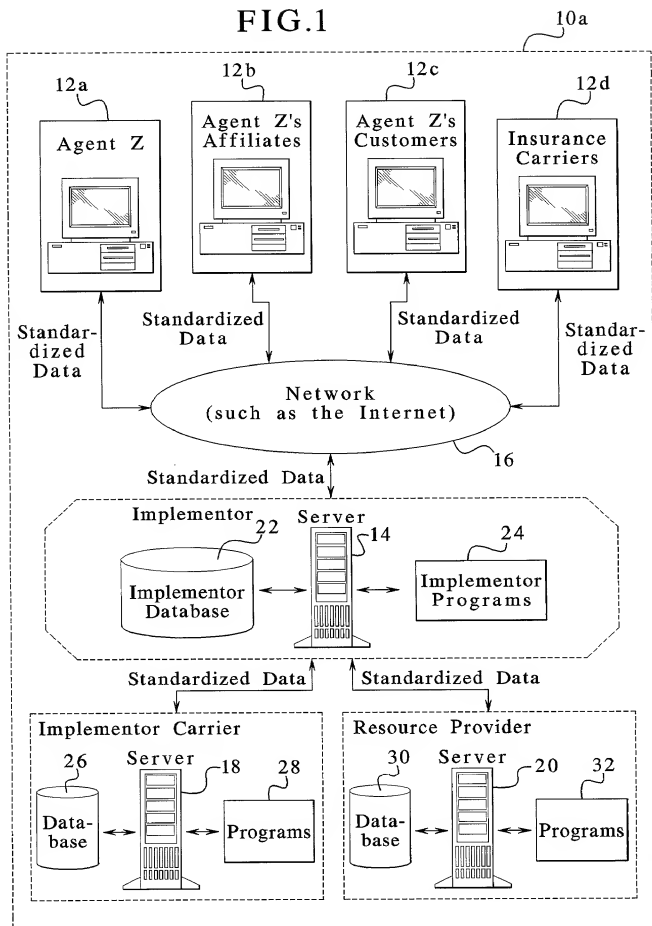


FIG.2

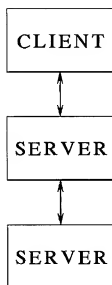


FIG.4

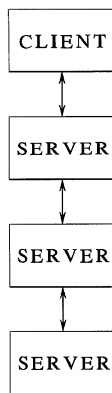


FIG. 3

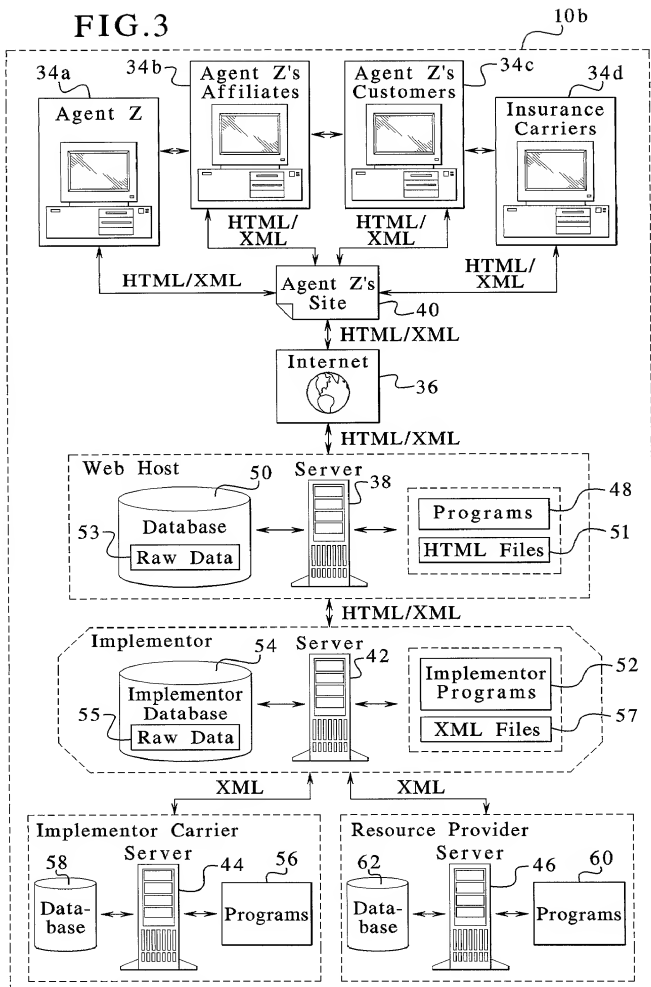


FIG.5

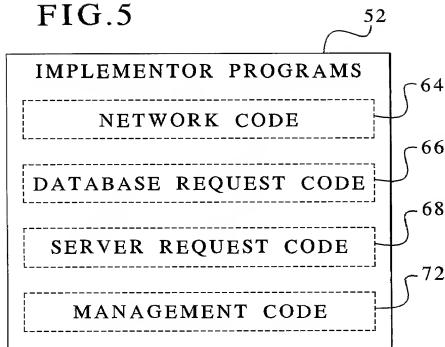


FIG.6

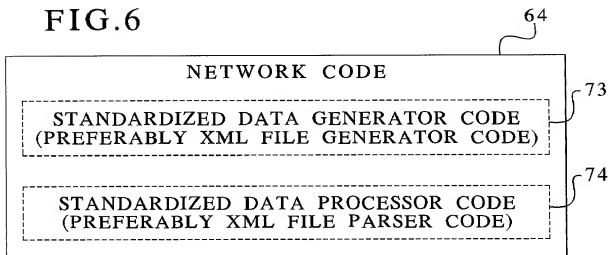


FIG. 7

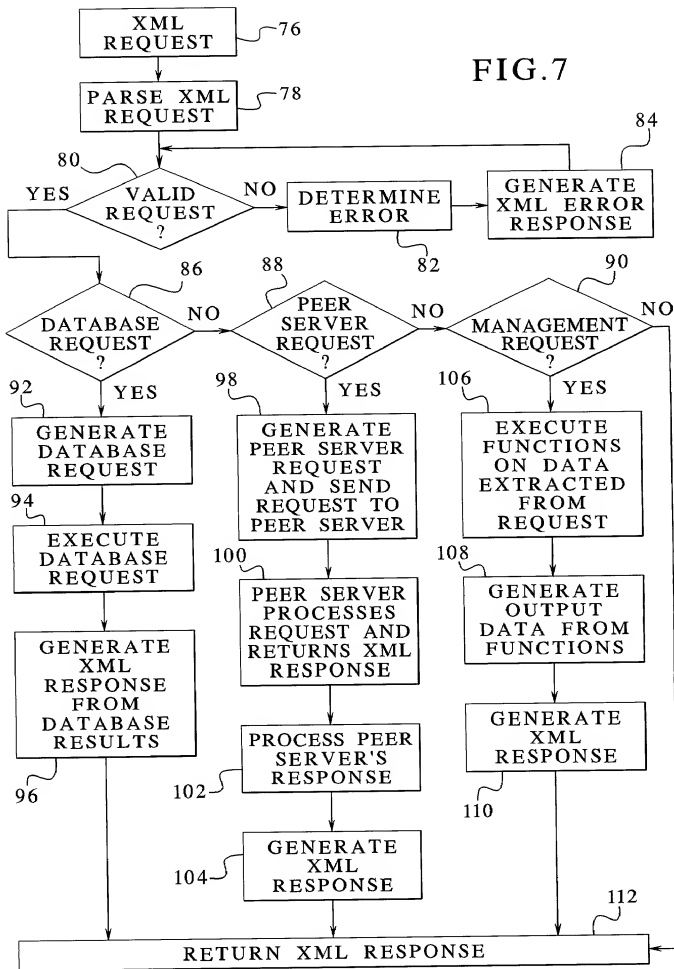


FIG.8

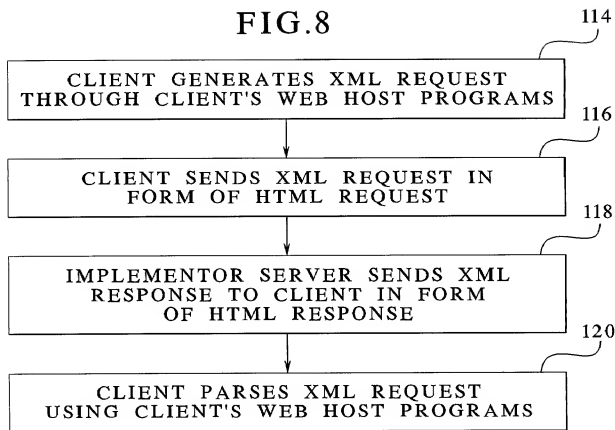


FIG.9

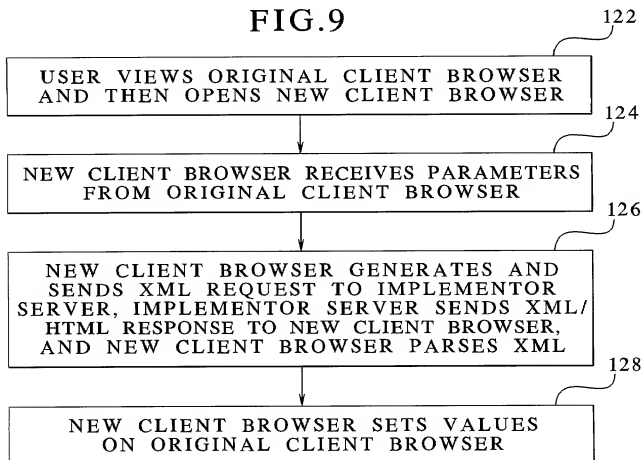


FIG.10A

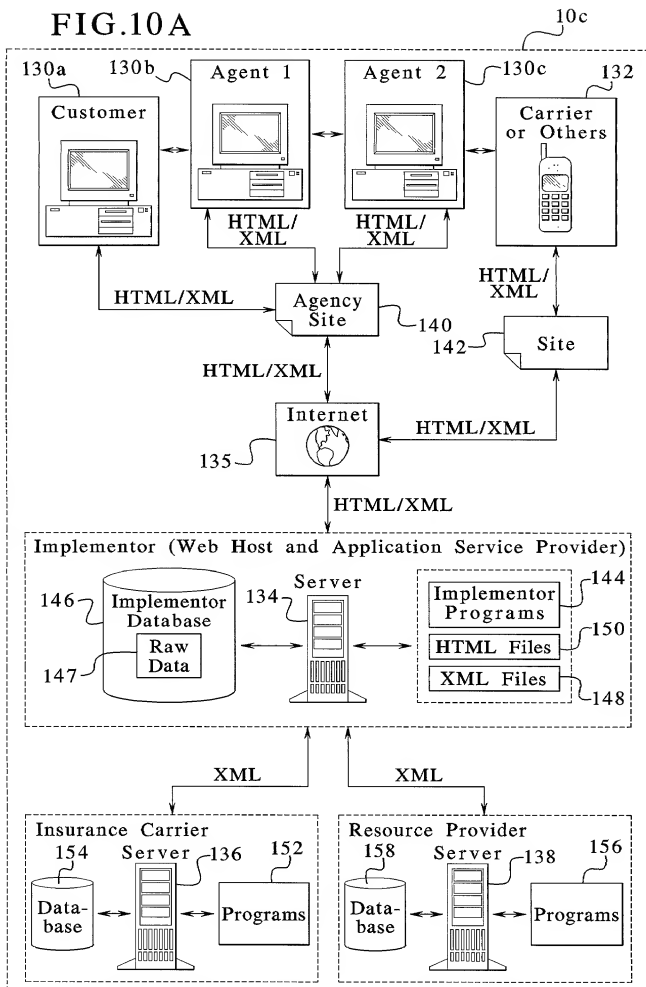


FIG.10B

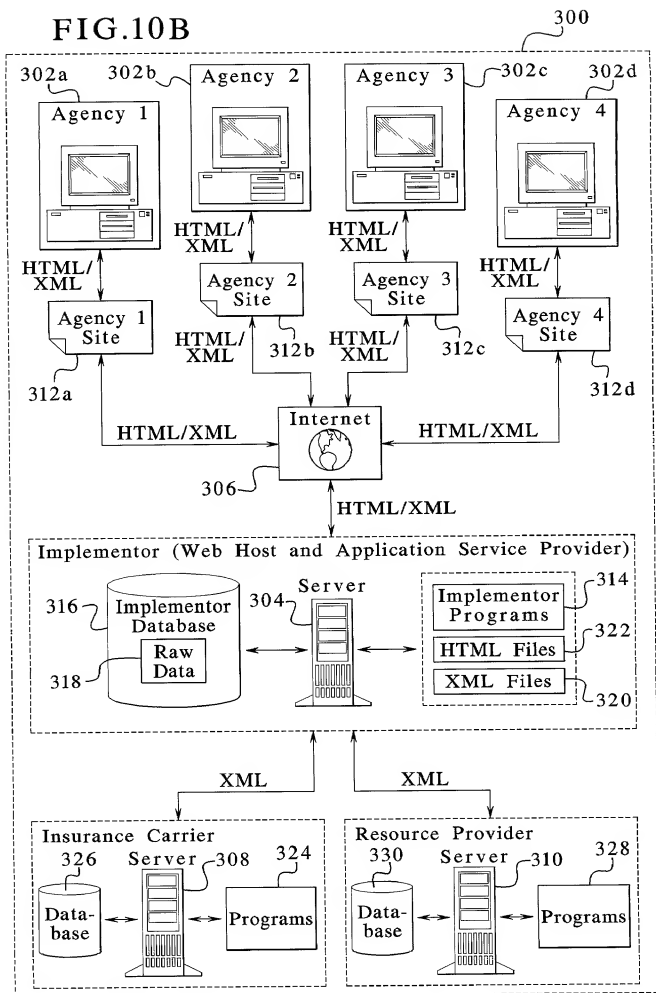


FIG.11

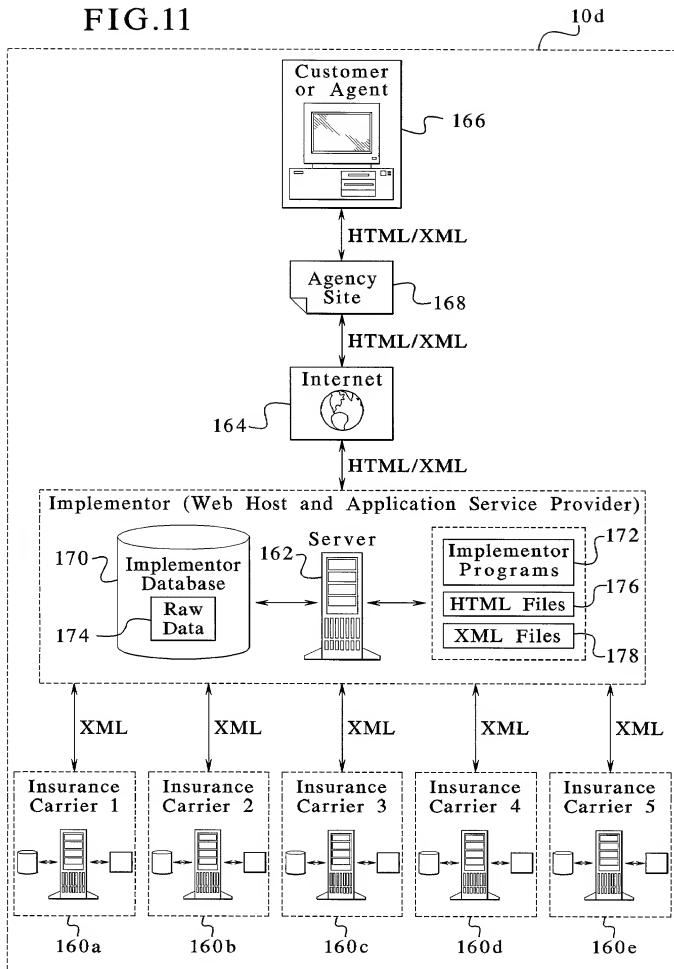


FIG.12

EXAMPLES OF ELECTRONIC
INSURANCE TRANSACTION DOCUMENTS

1. Agent Contact Form for Customer
2. Marketing Mailers
3. Policy Applications
4. Policy Quotes
5. Policy Binders
6. Issued Policies
7. Policy Tracking Reminders and Forms
8. Claims
9. Invoices
10. Other Documents

FIG.14

EXAMPLES OF SYSTEM TOOLS

1. Contact Information
2. Account Creation
3. Policy Creation
4. Invoicing
5. Payment Entry and Tracking
6. Reporting
7. Statements
8. Searching
9. Messaging
10. Interfacing to Existing Accounting System
11. Customization

FIG.13

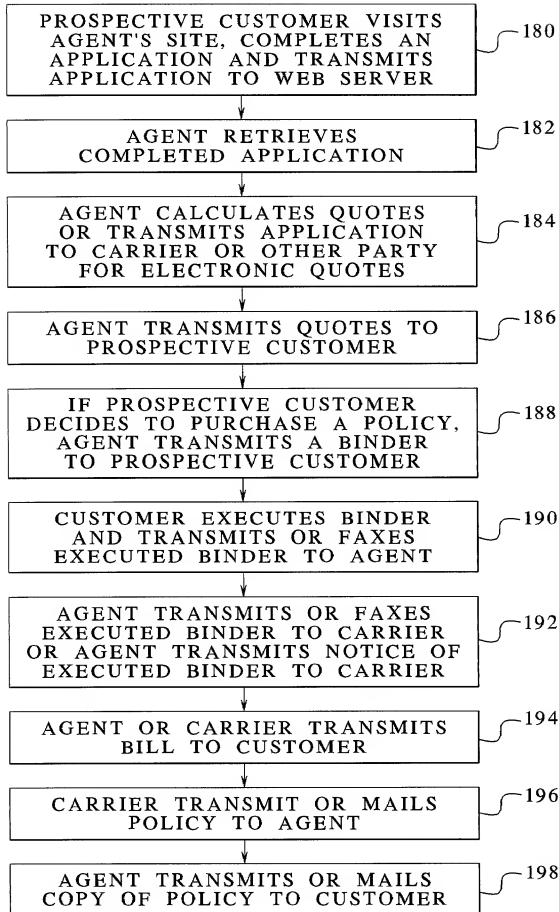


FIG.15

202

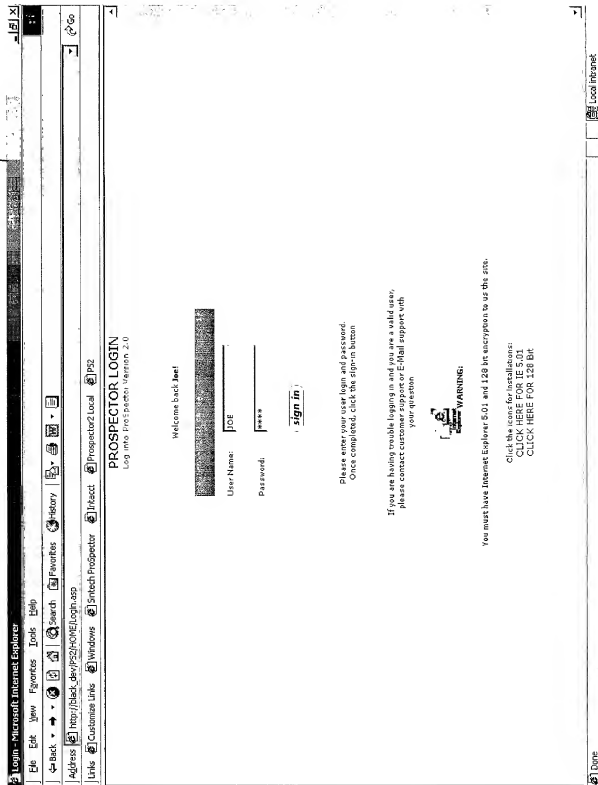
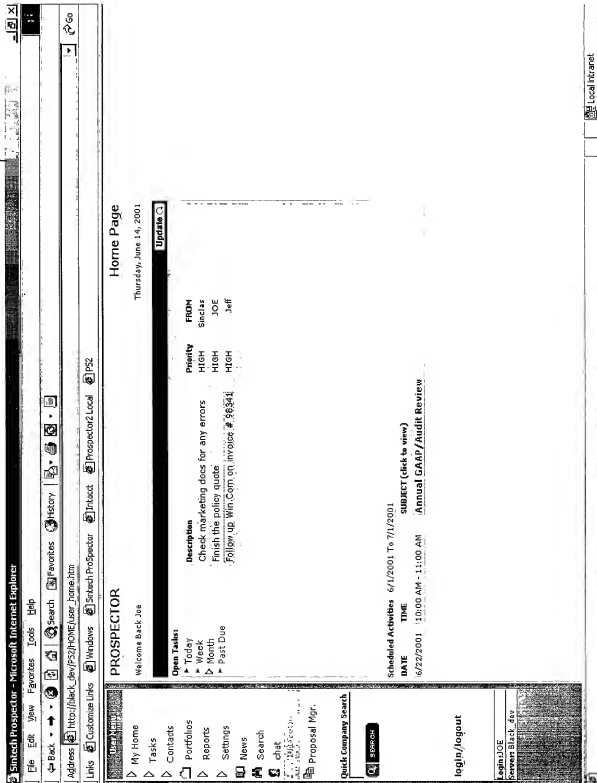


FIG.16

204



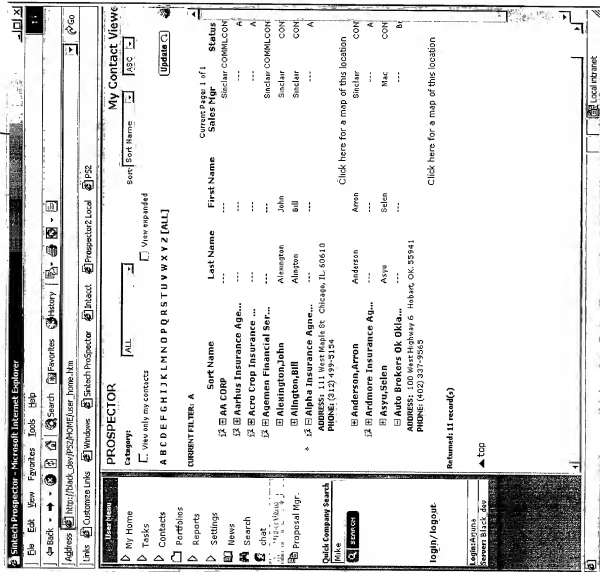


FIG.17

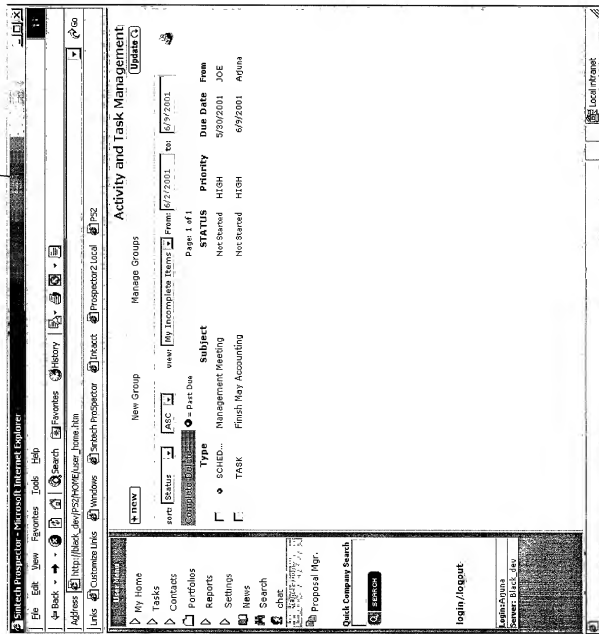


FIG.19

FIG.20

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Activity Editor - Microsoft Internet Explorer

ACTIVITY EDITOR

Assign To: DemoJoe

Activity Type: TASK

Subject: Follow up Win.Com on Invoice # 98341

Priority: HIGH

Start Date: Time AM PM

End Date: Time AM PM

Due Date: 6/22/2001

Status: Not Started

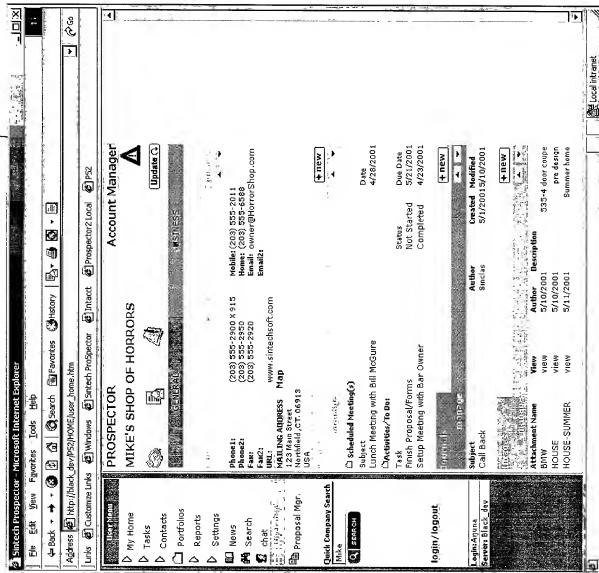
Description: This invoice is past due, please call to find status

Last Modified: 5/31/2001 10:26:59 AM

Close Update

FIG.21

214



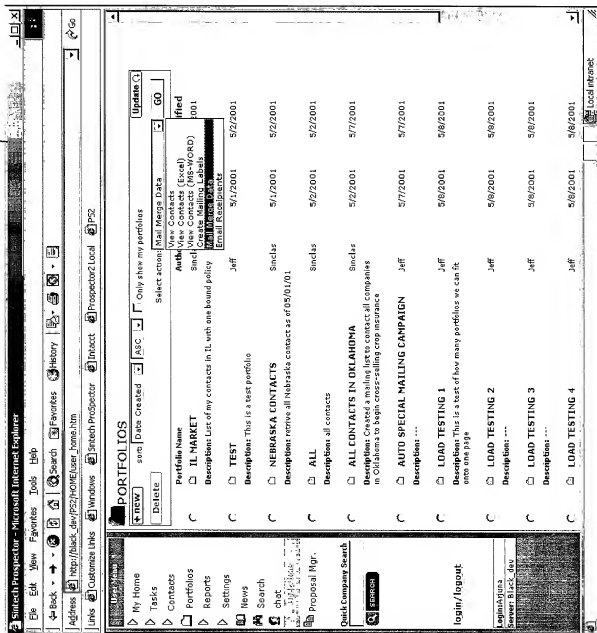


FIG.22

FIG.23

2 Proposal/Policy Editor - Microsoft Internet Explorer

PROSPECTOR Proposal/Policy Editor

Add/Edit Proposal/Policy Information

JMHII Construction

Proposal Information

Proposal Title: TEST

Product: --Select--

Agency: SINCLAS AGENCY TEST

Line: PC

☒ Info. Sent Date: 4/1/2001 By: --Select--

☒ Info. Rec Date: 4/1/2001 By: --Select--

☒ Quoted Date: 4/1/2001 By: --Select--

Carrier Name: Mutual Insurance Company

Quote: 5555 Quote Exp. Date: 4/1/2001

Follow-Up Date: 4/1/2001 Decision: Pending

Reason: --Select--

Memo:

Look Up

Look Up

Look Up

Save Close

FIG.24

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WORKERS COMPENSATION - Microsoft Internet Explorer

WORKERS COMPENSATION

POLICY INFORMATION		RATING INFORMATION	
Workers Comp (States)		select states	
Employer's Liability		EACH ACCIDENT	
		DISEASE-POLICY LIMIT	
		DISEASE-EACH EMPLOYEE	
Other States		select states	
Deductible		Amount	
MEDICAL		Amount	
INDEMNITY			
OTHER COVERAGES			
<input type="checkbox"/> U.S.L. & H	<input type="checkbox"/> MANAGED CARE OPTION		
<input type="checkbox"/> VOLUNTARY COMP	<input type="checkbox"/> FOREIGN COVERAGE		
Close	Acord Form	Quote	Update

FIG. 25

Payment Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://black_onyx.bellsoft.com/Invoice/PaymentManager.asp?admin=summary

Units Customizer Links Windows Smart Prospectors Intract Prospect2 Local P22

PROSPECTOR Payment Manager

Receivable Company Alpha Agency

Sort by Invoice # For Invoice Date From 1/1/2001 To 1/31/2001

Show Closed Inv (Entry Only) Payment Summary Update C

Select All Delete

Invoice #	Check #	Insured	Inv. Date	Pmt. Date Paid/Rec'd	Amount
01V105		ABC Grill	1/22/2001	2/1/2001 Rec'd	1075
01V105		Per Sa Technologies	1/22/2001	2/1/2001 Rec'd	500
01V105		Per Sa Technologies	1/22/2001	2/1/2001 Rec'd	2612
01V105		Per Sa Technologies	1/22/2001	2/1/2001 Rec'd	0
01A444		Per Sa Technologies	1/22/2001	2/1/2001 Rec'd	100
01A444		Per Sa Technologies	1/22/2001	2/1/2001 Rec'd	3024
01C101	5740	ABC Grill	1/22/2001	2/1/2001 Rec'd	3124
011136	5740	ABC Grill	1/22/2001	2/20/2001 Rec'd	905
011136	5740	ABC Grill	1/22/2001	2/20/2001 Rec'd	1005
129	5740	ABC Grill	1/15/2001	2/20/2001 Rec'd	1495
130	5746	ABC Grill	1/19/2001	2/20/2001 Rec'd	2150
134	5740	ABC Grill	1/22/2001	2/20/2001 Rec'd	975
1450	5700	Mario's Pizzeria	1/19/2001	2/1/2001 Rec'd	9813.43
1450	5750	Mario's Pizzeria	1/19/2001	2/1/2001 Rec'd	9813.43

Done Local Intranet

FIG.27

FIG.28

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Provider Statement - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Carrier Statement

Business from 2/1/2001 to 2/28/2001

Thursday, June 14, 2001

TO:

Mutual Insurance Company

1 Lawrence Ave

Chicago, IL 60601

Phone: 847-692-7898 Fax 847-592-7898

FROM:

SINTECH SOFTWARE

180 N Michigan Ave Suite 620

Chicago, IL 60601

Phone: 312-469-5150 Fax 312-469-5160

Product: Bill**Insured**

Policy #

City/State

3882011

Carrier Status

Carrier Total

Trans Type	Coverage	Effective Date	Expiration Date	Premium	Fees* Gross Comm. Taxes	% Gross	Paid To Company
PC	PC	2/2/2001	2/28/2002	13,100.00	0.00 (2,860.00)	22.00%	0.00 10,240.00
ENW				13,100.00	0.00 (2,860.00)		0.00 10,240.00
Carrier Total				13,100.00	0.00 (2,860.00)		0.00 10,240.00

232

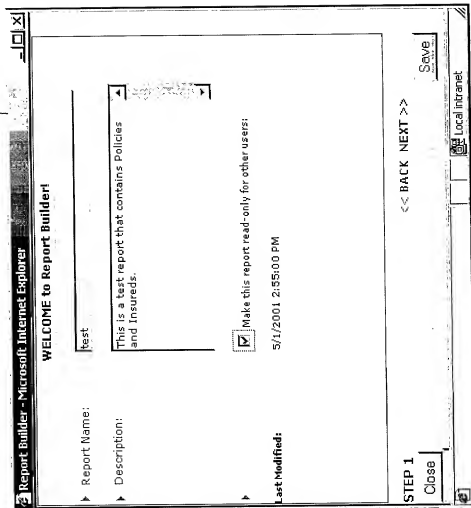


FIG.30

FIG.31

Report Builder - Microsoft Internet Explorer

DISPLAY FIELDS

Sort By: Contact

Available Fields

- #DecisionsPending
- #Declined
- #DeclinedEmps
- #EndingPremium
- #EmpsProposed
- #Sold
- #SoldEmps
- #SoldPremium
- Chapter Name
- CommName
- Contact Type
- Date Modified
- Department
- Employee Number
- Emps
- First Name
- IndexName
- Last Name
- Mailing Address
- Mailing City

Select: optional

Selected Fields

- CommName
- Primary Contact
- Mailing Address
- Mailing City
- Mailing State
- Postal Code
- Mailing Country

UP DOWN

<< BACK NEXT >>

Save

STEP 2

Close

Local intranet

FIG.32

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Report Builder - Microsoft Internet Explorer

FILTERS

+ ADD FILTER - REMOVE FILTER

Filter	Relationship	Value
<input type="button" value="C"/> CommName	<input type="button" value="Greater Equal"/>	<input type="text" value="K"/>
<input type="button" value="C"/> OR <input type="button" value="Mailing State"/>	<input type="button" value="Equal To"/>	<input type="text" value="ILLINOIS"/>
<input type="button" value="C"/> AND <input type="button" value="Mailing City"/>	<input type="button" value="Equal To"/>	<input type="text" value="Chicago"/>

ie: ILLINOIS

Sort Field: Direction:

STEP 3
Close

<< BACK NEXT >>

Save

Local intranet

FIG.33

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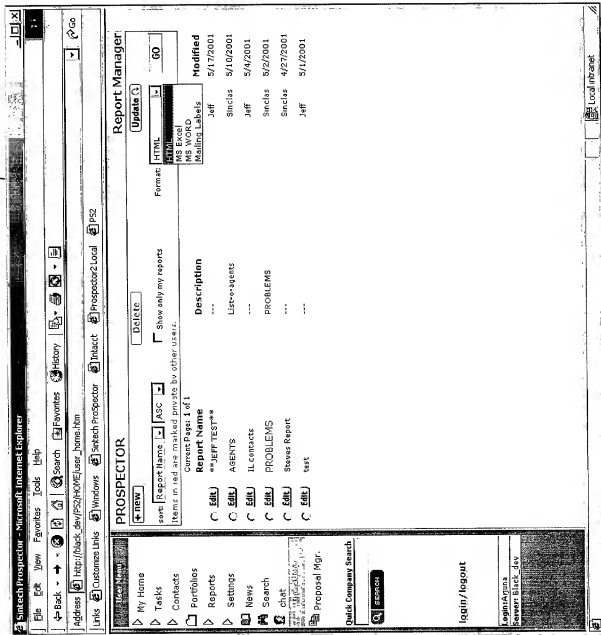


FIG. 34

